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MARKET ACCESS SECRETARIAT
Global Analysis Report

Sector Trend Analysis

Maple Products
In Germany

January 2017

EXECUTIVE SUMMARY

This sector trends report is meant to highlight potential opportunities for maple products and ingredients in the Geman market, through an analysis of new maple products introductions in Germany as well as an analysis of new food and beverage products containing maple.

Imports of maple sugar and maple syrup into the European Union (E.U.) currently face a tariff of 8%. Tariffs on these products will be entirely eliminated under the Comprehensive Economic and Trade Agreement (CETA) when the agreement comes to force. Canadian processed product exports containing maple syrup, such as cookies, will also benefit from immediate tariff elimination under CETA.

A growing trend toward health and wellness in Germany presents many opportunities for Canadian maple product suppliers. There is growing demand for healthier options in the market as the population ages and younger consumers are encouraged to consume healthier food options.

In terms of maple product and ingredients, a growing trend toward healthy and environmentally friendly and organic foods in Germany presents many opportunities to Canadian manufacturers and suppliers outside the maple syrup in its simplest form.

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- Metro Group In Germany
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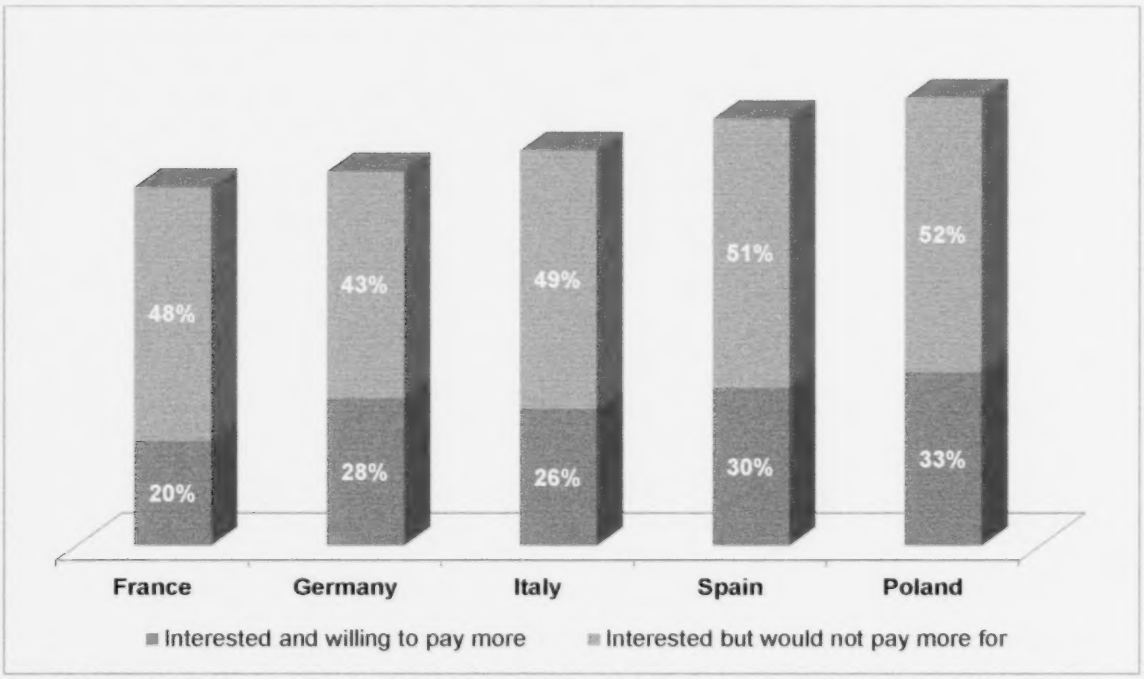
MARKET OVERVIEW

Overall, in Western Europe, sweet spreads and syrups continued to suffer from high levels of maturity and saturation as well as a old-fashioned image. Maturity of the category and competition from outside products are responsible for a weak performance in the last 5 years.

However, a good portion (20-33%) of consumers in the countries listed below would be willing to pay more for the extra nutritional benefits, such as antioxidants in spreads,syrups and the ones in maple products. The Mintel database indicates that, natural allergen free formulation and convinenent products are also on the rise, and 68-85% of consumers in Germany in particular would be interested in buying products with added health benefits.

Consumers Interested in Buying Sweet Spreads or Syrups with Added Benefits in Europe 2016 (vitamins fortified, omega 3, antioxidants)



Base: 906 French, 909 German, 942 Italian, 936 Polish and 917 Spanish internet users aged 16+ who have bought sweet or savoury spreads.
***Source:** Mintel Consumer Data Charts*

Germans consumers use maple syrup above all as a topping for yogurt or ice cream, or a topping for pancake an orther pastry items. While maple syrup is readily available on the German retail market, maple sugar can be found as a specialty product (healthier and higher-priced alternative to 'white' sugar).

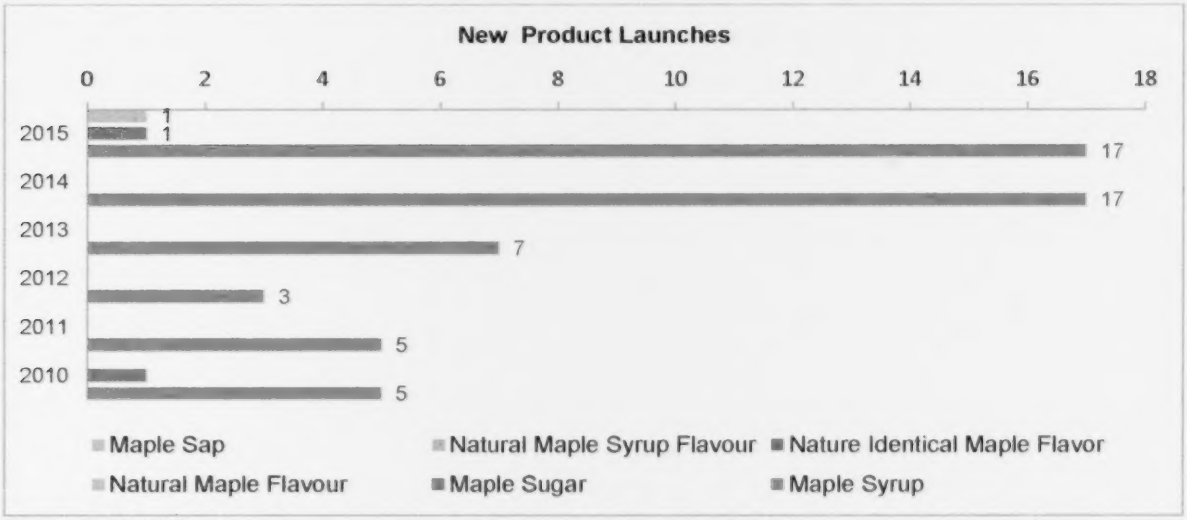
NEW MAPLE PRODUCTS IN THE GERMAN MARKET

Maple products are popular across all age groups in Germany especially in their simple form, syrups. On the other hand, Allthough sweet spreads are particularly popular among older generations there are hardly any sweet maple spread including maple butter and maple cream in the German market. There is also growing concern about the health and wellness attributes of other sweetners, which also open the door to maple sugar for its natural attribute.

In Germany, maple sugar, as a natural sweetener, tends to have a healthier image among consumers because of the health and wellness image and premium trends, and the same is likely true for maple syrup. However, price increases have resulted in some categories becoming overly expensive for consumers, including other maple products.

The number of new products containing maple products introduced in Germany increased sharply over the last 3 years, from a low of only 5 new products in 2010 to a high of 19 new products in 2015.

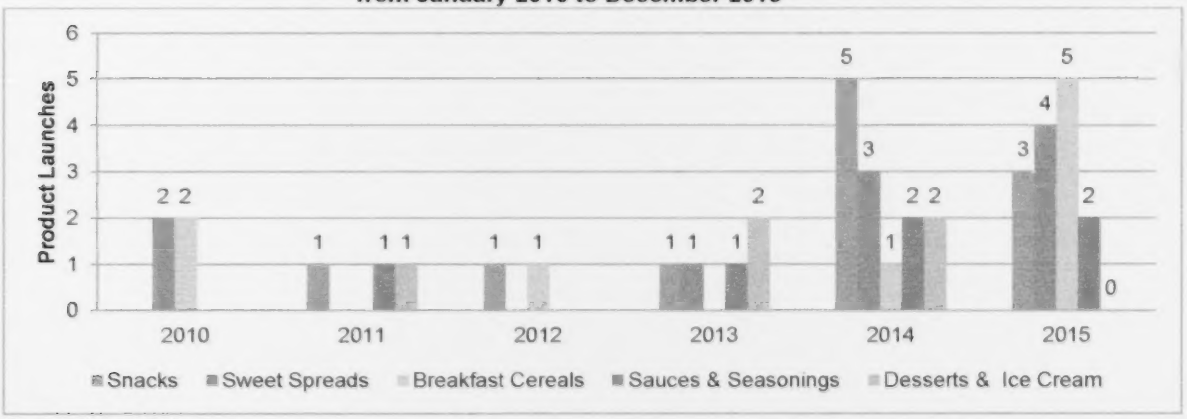
Germany, New Food Product Launches with Maple Ingredients by Year, from January 2010 to December 2015



Source: Mintel, 2016.

From January 2010 to December 2015, there were 56 new products launched in Germany that contained maple products. In 2015, the breakfast cereals category saw the largest new product introductions with five new products, followed closely by sweet spreads with four new products and snacks with three new products.

Germany, New Product with Maple Ingredients, Top Five Categories, from January 2010 to December 2015



Source: Mintel, 2016.

**New Products with Maple Ingredients in Germany,
By Subcategories, From January 2010 to December 2015**

Sub-Category	2010	2011	2012	2013	2014	2015	Number of Products
Snacks/cereal/energy bars	0	0	0	1	5	3	9
Cold cereals	2	0	1	0	1	4	8
Syrups	2	0	0	0	2	4	8
Table sauces	0	1	0	0	2	2	5
Dairy-based frozen products	0	1	0	2	2	0	5
Fish products	0	0	0	0	2	1	3
Sweet biscuits/cookies	0	0	1	0	0	1	2
Flavoured milk	0	0	0	2	0	0	2
Non-individually wrapped chocolate pieces	0	1	0	0	0	1	2
Cakes, pastries and sweet goods	0	0	0	0	1	0	1

Source: Mintel, 2016.

New launches containing maple included products across a wide range of categories. Snacks bars, cold cereals and syrups represented the most new maple launches. Mintel notes that snack/cereal/energy bar launches in Germany are very popular and bodes well with the trends of on the go life style.

**New Products with Maple Ingredients by Top 10 Claims in Germany,
from January 2010 to December 2015**

Claim	2010	2011	2012	2013	2014	2015	Number of Products
Organic	3	1	2	1	5	11	23
Low/no/reduced allergen	2	0	0	1	2	3	8
Vegan	0	0	1	1	2	4	8
No animal ingredients	0	0	1	1	2	4	8
Wholegrain	0	0	1	0	3	3	7
Gluten-free	2	0	0	1	2	1	6
No additives/preservatives	0	0	1	0	2	1	4
Kosher	0	0	0	1	2	1	4
Vegetarian	0	0	1	0	2	1	4
No specified claim	2	2	1	2	4	1	12

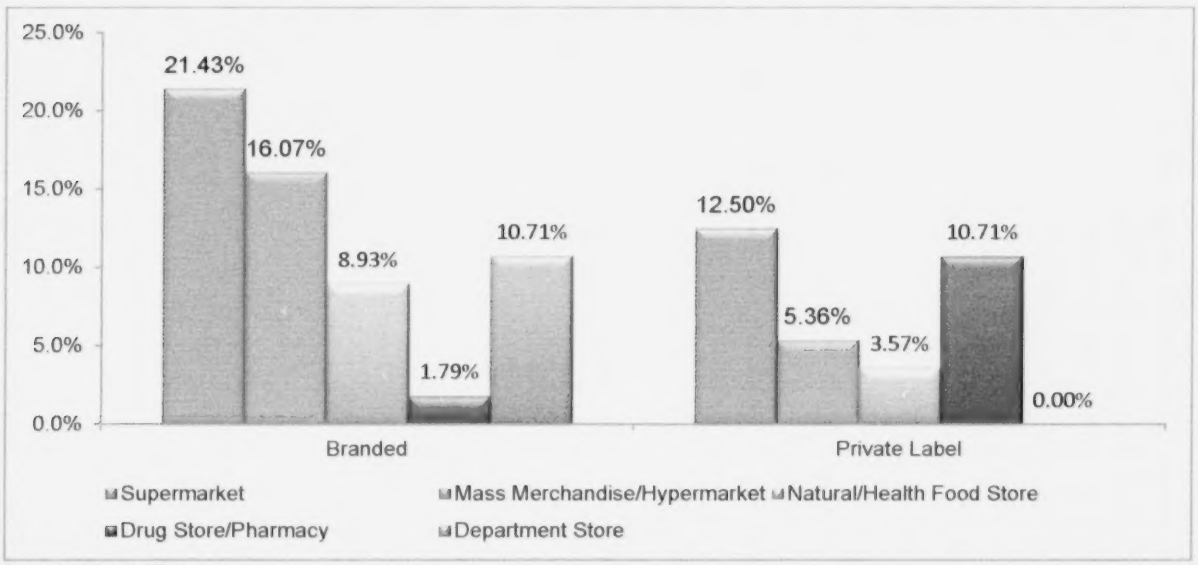
Source: Mintel, 2016.

According to Mintel, organic was the top claim with an 23 products or 39.3% share of the maple products new products launches in the German market. The sector continues to be driven by health and wellness trends, with a growing presence of organic products suitable for vegetarians and vegans. No animal ingredients and gluten-free claims are also gaining ground as a way of differentiating products and brands.

DISTRIBUTION CHANNELS

Of new maple products launches between 2010 and 2015, the majority were located in supermarkets (roughly 34% of maple products launches), followed closely by mass merchandisers/hypermarkets. However, natural/health food stores and drug stores/pharmacies retailers also offered some of the new maple products.

Germany, Distribution Channels and Number of Private Label versus Branded Product Containing Maple Ingredients, from January 2010 to December 2015



Source: Mintel, 2016.

Pricing for new maple products launches in Germany, from January 2010 to December 2015, varied significantly, ranging from US$2.64 for 25g-100g packages and US$2.65 to US$ 8.48 for a 250ml.

Price Point of Maple Products and Package Type, from January 2010 to December 2015

Price in US Dollars (Group)	Flexible	Bottle	Jar	Carton	Tub	Tray	Flexible stand-up pouch	Skinpack
0.73 - 2.64 US$	50.0%	14.3%	0.0%	75.0%	50.0%	50.0%	0.0%	0.0%
2.65 - 4.56 US$	18.2%	21.4%	40.0%	25.0%	50.0%	50.0%	50.0%	0.0%
4.57 - 6.48 US$	22.7%	35.7%	20.0%	0.0%	0.0%	0.0%	0.0%	50.0%
6.49 - 8.40 US$	4.5%	14.3%	40.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8.41 - 10.33 US$	4.5%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%

Source: Mintel, 2016

Carton packaging was the most popular package type for maple product launches in Germany, with 75% of launches using this packaging were priced between US$0.73 and US$2.64.

NEW PRODUCT EXAMPLES

Mini Caramel Waffles with Maple

Company:	Daelmans Banket
Brand:	Daelmans
Category:	Bakery
Sub-Category:	Sweet Biscuits/Cookies
Country:	Germany
Country of Manufacture:	Netherlands
Import Status:	Imported product
Store Name:	GALERIA Kaufhof
Store Type:	Department Store
Launch Type:	New Variety/Range Extension
Price in US Dollars:	$3.15

Daelmans' mini caramel waffles with Maple, are soft, Dutch waffles with a sweet creamy filling. The products claims to be a vegetarian product, made with sustainable palm oil, is free from artificial colourings.

Cranberry Fruit Bars with Walnuts and Maple Syrup

Company:	Edeka Zentrale
Brand:	Edeka
Category:	Snacks
Sub-Category:	Snack/Cereal/Energy Bars
Country:	Germany
Store Name:	Marktkauf
Store Type:	Supermarket
Launch Type:	New Variety/Range Extension
Price in US Dollars:	$2.52

Edeka cranberry fruit bars with walnuts and maple syrup features a 53% fruit content and retails in pack containing three 30g bars that are ideal for on the go.

Organic Grade A Maple Syrup

Company:	DM Drogerie Markt
Brand:	DM Bio
Category:	Sweet Spreads
Sub-Category:	Syrups
Country:	Germany
Country of Manufacture:	Canada
Import Status:	Imported product
Store Name:	dm-drogerie markt
Store Type:	Drug Store/Pharmacy
Launch Type:	New Product
Price in US Dollars:	$6.41

DM Bio Ahornsirup grad A organic maple syrup feature a mild sweet flavour and golden colour. This fine syrup claims to be ideal for the refinement of sweet and sour dishes or together with sweet desserts. It is suitable also for vegans..

Canadian Maple Syrup Cereal Bars

Company:	General Mills
Brand:	Nature Valley Crunchy
Category:	Snacks
Sub-Category:	Snack/Cereal/Energy Bars
Country:	Germany
Country of Manufacture:	Spain
Import Status:	Imported product
Store Name:	Real
Store Type:	Mass Merchandise/Hypermarket
Launch Type:	New Product
Price in US Dollars:	$2.67

Nature Valley Canadian maple syrup cereal bars, is a crunchy cereal bars with wholegrain rolled oats and Canadian maple syrup. The product is certified kosher and halal, claims to be suitable for vegetarians, and retails pack of five units of 42g each.

Canadian Berries Cranberry Sauce with Maple Syrup

Record ID:	2334004
Company:	REWE Markt
Brand:	Rewe Feine Welt
Category:	Sauces & Seasonings
Sub-Category:	Table Sauces
Country:	Germany
Store Name:	REWE
Store Type:	Supermarket
Product source:	Shopper
Launch Type:	New Packaging
Price in US Dollars:	$2.67

Rewe Feine Welt Beeren Kanadas cranberry-sauce with maple syrup is an aromatic gourmet sauce made with natural caramel of maple syrup and Canadian cranberries. This sauce claims to be the perfect accompaniment to cold starters, strong beef and game dishes, baked Camembert cheese, mozzarella sticks, pastries and smoked fish. The product is free from preservatives.

CONCLUSION

According to Euromonitor, retail sales in the packaged food market in Germany had been estimated to reach US$88.1 billion in 2015. Currently, Germany is the 6th largest packaged food market in the world and the 2nd largest in the European Union (EU). That also represents a growth rate of 8.8% or US$8.9 billion since 2011. Furthermore, Euromonitor forecast an increase of 3.6% or just over US$3.1 billion by 2020 to US$91.3 billion.

High growth categories in the forecast include sweet and savory snacks; confectionery; oils and fats; dairy; ice cream and frozen desserts; processed meat and seafood; and baby food.

Demand for convenience, health, and wellness, and vegetarian/vegan products as well as luxury products, will remain a consumer trend influencing food retailing into the future. Another trend is that German consumers take great pride in being green. Therefore, German consumers are willing to pay more for "sustainable, "free range," "natural," "organic," "fair trade" and "carbon neutral" products.

The strong growth of organic foods has had a positive effect on the natural ingredients industry, since many organic processed foods also contain natural extracts, colourings and flavours.

The market for organic and naturally-derived ingredients grew strongly in recent years, due to German consumer awareness of the importance of nutrition and healthy eating. Maple sugar, syrups, and maple ingredients have a great potential to be increasingly incorporated into mainstream products.

At US$281. million in exports, Canada was the largest exporter in the world of maple sugar and syrup in 2015. The US was our largest export market for maple sugar and maple syrup with imports of US$179.2 million in 2015 or 63.8% of Canada total exports, followed by Germany with US$24.2 (8.6%). Germany represented 39.7% of all maple products destined to the EU.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Find a Trade Commissioner**

  http://tradecommissioner.gc.ca/germany-allemagne/index.aspx?lang=eng

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For additional information on SIAL Paris 2016, please contact:
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RESOURCES

Euromonitor International Database, 2016.

Mintel Global New Products Database, 2016.

Sector Trend Analysis: Maple Products in Germany

Global Analysis Report

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